Request for Proposals (RFP)

Integrated Workplace Management System

Proposal Submittal Date
Thursday, November 15, 2007

City of Houston
General Services Department

REQUEST FOR PROPOSALS
FOR
INTEGRATED WORKPLACE MANAGEMENT SYSTEM

I. PURPOSE

The General Services Department (GSD) of the City of Houston (City) is interested in implementing a commercially available Integrated Workplace Management System (IWMS) for the purpose of managing all aspects of the City's owned and leased real estate portfolio. This RFP is intended to identify a firm that can provide such a system.

II. PRE-PROPOSAL MEETING

A pre-proposal meeting will be held on Tuesday, November 6, 2007, at 10:00 a.m. City Hall Annex 900 Bagby, 2nd Floor Conference Room, to discuss this solicitation. Attendance at the meeting is not mandatory.

Before the pre-proposal meeting date, the City will welcome any <u>written</u> questions submitted, faxed or emailed to:

> Phil Golembiewski, P.E.
> City Engineer
> General Services Department
> 900 Bagby, Second Floor
> Houston, Texas 77002
> Fax: 713-437-6859
> Philip.Golembiewski@cityofhouston.net

- The City will not be bound by any information conveyed verbally. The City will provide, in writing, any clarifications, changes and/or other information, deemed to be necessary, as addenda to this RFP.
- Addenda will only be provided to pre-submittal meeting attendees and known RFP holders registered with GSD.
- No Addendum will be issued later than noon on Tuesday before the Proposal Submittal Date, except Addenda with minor clarifications, withdrawing RFP, or postponing the Proposal Submittal Date.

III. OBJECTIVE

GSD proposes to acquire an Integrated Workplace Management System (IWMS) to support its real estate and facilities management services. The vendor must prove that they have:
1. a product that meets the functional requirements of this RFP
2. skilled implementation personnel to successfully deploy their solution in support of the requirements.
The firms that participate in this RFP process will be referred to as "Respondents".

IV. **SCOPE OF WORK**

A. Description of Scope of Work the IWMS solution must address:

1. **Project Management –** Management of major construction, stacking and relocation projects, including the ability to define, track and monitor all project assignments, tasks and costs.

2. **Portfolio Management** – Manage land, buildings, energy management, and building-related assets. The focus of Portfolio Management is the building-level data versus Space Management that is focused inside the building envelop. Portfolio Management includes Lease Administration, Real Estate Transactions Management (acquisitions and dispositions), Energy Tracking, Environmental Activities, and Strategic Planning (including Relationship Management and Long Range Planning).

3. **Space Management** – Manage space allocations, space assignments and utilization, and the pipeline. Includes management of changes to space (Move-Add-Change [MAC]). Ergonomics and reservation of common spaces (such as conference rooms) is also part of this process group. Planning of space utilization (including stacking and blocking) is also included.

4. **Facilities/Maintenance Management** – Responsible for the lifecycle management of real property assets including preventive maintenance, demand maintenance, and deferred maintenance. It includes the management of the technical resources and management of resource productivity.

The proposed solution must meet a list of technical and general functionality that applies to all four of the IWMS modules. This includes:

- **Integrate the new enterprise technology with the City's SAP** system for financial and HR data
- Utilize a **simple, intuitive,** user-friendly web-based technology.
- Allow the City to **hold content owners accountable** for content accuracy and entry.
- Support and control **standardized "best practices"** to enforce a consistent business discipline across the entire organization.
- Automate repetitive, back-office tasks to streamline processes, expedite access to critical information and eliminate roadblocks

B. In pricing Operational Assumptions solution and developing a deployment strategy/schedule, Respondent should consider the following assumptions:

- A baseline scenario of approximately 8 million square feet of total space in the database, broken down as illustrated in the following table:

Portfolio

Total # of Sites	**371**	**Total Sq Ft**	**7,898,510**	
Owned Sites	255	Owned Sq Ft	7,198,510	
Leased Sites	116	Lease Sq Ft	700,000	

Unimproved properties   24   Estimated total acres   5,334

NOTE: The city also has an unknown number of additional unimproved properties that may some day need to be tracked, but for now they are out of scope of this RFP

Average number of lease transactions performed each year = **50**
Average number of purchases each year = **10-12**
Average number of sales each year = **10-12**

A projected user base of:

Number of anticipated <u>concurrent</u> Users	Portfolio Mgmt	Space Mgmt	Facility / Maint. Mgmt	Project Mgmt	Total
"Power" Users – those using the full functionality of the system on a day-to-day basis. (Anticipated usage = 8 hrs/day)	3	3	5	25	36
CAD linked to IWMS Users – The number of "Power Users" that will need to manipulate CAD drawing within the IWMS toolset. (Anticipated usage = 8 hrs/day)	0	3	0	4	7
General/Executive Users – Those individuals that will be monitoring metrics, approving actions, running reports, etc. (Anticipated usage = 4 hrs/day)	5	2	5	10	22
End Users – Those initiating requests and monitoring the progress of their requests. (Anticipated usage = 15 minutes/week)	20	15	250	75	360

Number of active projects at any one time = 100

For service management, the estimated number of:

- Work orders typically created per year = 45,000

- Technicians that could use wireless devices to assist in the execution of work = 40

The GSD actively manages the following for Move-Add-Change (MAC) activities:

- Number of square feet under management = 3,000,000

- Number of people tracked = 5,000

Integration data will need to be loaded into the IWMS solution from the City's SAP system for financial and HR data.

Number of electrical meter readings to be transferred to the system weekly = 5,000

V. **PROPOSAL ORGANIZATION**

1.   To enable the City to efficiently evaluate Proposals, it is MANDATORY that Respondent follows the required format in preparing its Proposal. Proposals that do not conform to the prescribed format will not be evaluated.

2.   The Proposal response must be delivered in both printed and electronic format in the form of **six** hardcopy documents (standard binders) and six Compact Discs in Microsoft Word format. The binders and discs shall be submitted in a sealed box.

3.   Binders are used to ensure that pages are not lost. Each binder shall be no more than one inch thick. Pages shall be no larger than letter-size (8½" by 11"). Tabbed sections, as defined below, shall separate information provided. Elaborate binders and dividers are not required nor wanted.

4.   The Proposal shall consist of a cover letter and Appendices A, B, C, and D. These appendices should be divided in tabbed sections in the binders.

5.   To the extent possible, your answers to the questions posed in Appendices A through D should be entered directly into those forms. When completing the forms, the Respondent is required to break out the response into all components requested. Please do not deviate from the structure detailed in this RFP. If the Respondent believes additional information is relevant to a particular bid, please include that information on separate attachments.

6.   GSD is open to additional alternative recommendations by potential Respondents ONLY after requested format is completed.

7.   Any fees and rates included in the response to this RFP shall be specifically guaranteed in your cover letter for a period equal to the anticipated term of a service contract, but not less than six months.

VI. **SELECTION CRITERIA**

GSD will base its proposal evaluation and selection on all information received. Each proposal submitted will be evaluated impartially against the same set of criteria. The proposal evaluation criterion includes:

- Ability to provide the software and services required to support the implementation of the Integrated Management Workplace System:
    - General Performance Requirements (15 points)
    - Real Estate/Portfolio Management Requirements (10 points)
    - Space Management Requirements (20 points)
    - Project Management Requirements (20 points)
    - Maintenance Management Requirements (10 points)

- o Energy Management Requirements (5 points)
- Competitive pricing. (20 points)

Respondents may receive up to 100 points.

- Note: The Technology Requirements will be reviewed to assure the solution meets minimum security and infrastructure compatibility requirements, thus there are no points awarded. This review is strictly "pass/fail".

The Respondent selected for an award will be Respondents who's Proposal, as presented in response to this RFP, are the most advantageous to the City and offers the best value. The City is not bound to accept the lowest priced Proposal if that Proposal is not in the best interest of the City as determined by the City.

1. Submission of a Proposal indicates Respondents acceptance of the evaluation technique and Respondents recognition that some subjective judgments must be made by the City during the assigning of points.

VII. **SUBMITTALS**

Submittals shall be delivered to City Secretary of the City of Houston, in the Margaret Westerman Building (a.k.a. City Hall Annex), **Public Level**, 900 Bagby Street, Houston, TX 77002, before 10:30 a.m., local time, Thursday, November 15, 2007. Late submittals will <u>not</u> be accepted for any reason. All submittals must be provided in a sealed box clearly labeled on the outside with the Respondent's name, name of the Project, and General Services Department.

1. Proposals are publicly opened by the City Secretary in City Council Chambers on the public level in City Hall Annex at 11:00 a.m. on the Proposal Submittal Date.

2. Place and date of Proposal opening may be changed in accordance with Sections 15-3(b)(5) and 15-3(b)(6) of the City Code.

3. The City Secretary will publicly identify the names of the Respondents.

VIII. **ADDITIONAL INSTRUCTIONS, NOTIFICATIONS AND INFORMATION**

1. Respondents shall not offer any gratuities, favors, or anything of monetary value to any official or employee of the City for the purposes of influencing this selection. Any attempt by the Respondent to influence the selection process by any means, other than disclosure of qualifications and credentials through the proper channels, shall be grounds for exclusion from the selection process.

2. Respondents who provide false or misleading information, whether intentional or not, in any documents presented to the City for consideration in the selection process shall be excluded. Any false or misleading information in these documents would, in effect, render the entire document suspect and therefore useless.

3. **Demonstrations** – After the screening of Proposals, Respondents will be notified, in writing, of their status in the selection process. Short-listed Respondents may be required to demonstrate their solution to GSD. Respondents unwilling or unable to provide onsite demonstrations when requested by GSD will not receive further consideration.

4. **Inquiries** – Please do not contact the City during the selection process to make inquiries about the progress of this selection process. Respondents will be contacted when it is appropriate to do so.

5. **Cost Of Proposals** – The City will not be responsible for costs incurred by anyone in the submittal of proposals or for any costs incurred prior to the execution of a formal contract.

6. **Confidential Information** – All responses shall be held confidential from other parties by the City to the extent allowable by law until after the selection process is completed. Respondents should be aware that at the completion of the selection process the contents of their Proposals are subject to the provisions of the Texas Public Information Act and may be made public.

7. **City Policies & Ordinances** – Respondents should be aware of and therefore, familiar with all pertinent City of Houston Ordinances and policies   which will relate to contracting with the City. More detailed guidance is   available   on request. The following is a partial list of relevant subjects:

    a. Equal Employment Opportunity

    b. City of Houston Fair Campaign Ordinance

    c. City Contracts and Indebtedness to Taxing Authorities

    d. Conflict of Interest Questionnaire

8. The City of Houston reserves the right to (1) evaluate the proposals submitted; (2) waive any irregularities therein; (3) select Respondents for the submittal of more detailed information; (4) accept any submittal or portion of a submittal; and/or (5) reject any or all Respondents submitting proposals, should it be deemed in the City's best interest.

Phil Golembiewski, P.E.
City Engineer
General Services Department

Date: _____ _____

Appendix A – General Response Requirements

1. Please provide your company's full legal name:

2. Provide the complete mailing address for your primary offices:

3. Under what form of business is your company organized?

4. In what state is your company chartered?

5. Is your company publicly traded?   Yes ☐   No ☐

   If YES, what is your company's stock ticker symbol?

6. How many years has your company been in business?

7. For how many years has your company been providing IWMS tools?

8. With whom in your organization would contract negotiations take place, if your company should be awarded the business contemplated in this RFP?

Name	
Title	
Email Address	
Telephone	

9. Do you outsource any portion of your solution consulting or implementations?

                          Yes ☐   No ☐

If YES, you must describe what is outsourced and the relationship you have with the organization.

10. From what cities do you deliver support services?

11. Please provide three client references. These references must be using the solution you have proposed in your response and should be similar to the scale and functionality outlined in the RFP. Also indicate the type of on-going relationship you have with each customer. PLEASE NOTE: YOU MUST PROVIDE CONTACT INFORMATION IN YOUR RESPONSE SINCE THE REFERENCES WILL BE CONTACTED PRIOR TO SCHEDULING ANY DEMONSTRATIONS.

Company Name			
Contact			
Email Address			
Telephone			
Products Licensed	Production Start Date	# of Active Users	SqFt managed by geographic region
Your Ongoing Relationship with Client			

Company Name			
Contact			
Email Address			
Telephone			
Products Licensed	Production Start Date	# of Active Users	SqFt managed by geographic region
Your Ongoing Relationship with Client			

Company Name			
Contact			
Email Address			
Telephone			
Products Licensed	Production Start Date	# of Active Users	SqFt managed by geographic region
Your Ongoing Relationship with Client			

12. Information on your services:

- Describe your customer service model.

- What are your customer service standards? How are they measured?

- Describe how a customer inquiry is received, processed, and resolved.

- Describe your implementation approach and deliverables. In particular, describe your testing procedures to assure a fully operational solution.

13. Billing information:

- Describe your billing procedures and discounts policy.

- What are your payment terms?

Appendix B - Pricing & Schedule information:

The City of Houston is interested in implementing a single IWMS solution to cover all four functional areas addressed in this RFP. However, it is a possibility that we will initially implements less than all four modules. Thus, this RFP requires pricing be broken down by module such that it can be easily determined the cost of implementation of any combination of the four modules as the initial deployment.

- The cost of any software you provide as part of your solution (breakdown by module).

Software Component	Price (U.S. Dollars)
Core Software (platform, base functionality, etc) required regardless of the module(s) implemented	
Portfolio Management functionality	
Space Management functionality	
Facility/Maintenance Management functionality	
Project Management functionality	
Total IWMS implementation	

- Are there any discounts that apply if more than one module is implemented? Please describe.

- Support and maintenance costs for your software (delineate each cost during implementation, as well as each on-going cost after implementation is complete).

Support & Maintenance Component	Price (U.S. Dollars)
Core Software (platform, base functionality, etc) required regardless of the module(s) implemented	
Portfolio Management functionality	
Space Management functionality	
Facility/Maintenance Management functionality	
Project Management functionality	
Total IWMS implementation	

- Anticipated Training, Documentation and Knowledge Transfer costs associated with this implementation.

Training, Documentation & Knowledge Transfer Component	Price (U.S. Dollars)
Core Software (platform, base functionality, etc) required regardless of the module(s) implemented	
Portfolio Management functionality	
Space Management functionality	

Facility/Maintenance Management functionality	
Project Management functionality	
Total IWMS implementation	

- Anticipated Implementation Services for your staff and/or service partners (see Desired Schedule Section below) for both labor and expenses associated with a deployment of this type.

Implementation Services Component	Price (U.S. Dollars)
Core Software (platform, base functionality, etc.) required regardless of the module(s) implemented	
Portfolio Management functionality	
Space Management functionality	
Facility/Maintenance Management functionality	
Project Management functionality	
Total IWMS implementation	

- It is anticipated that any software solution selected will require configuration or customization to meet the City's functional and process-driven requirements. Based on your experience with similar implementations, explain the level of configuration/customization anticipated (extensive/moderate/ minimal/none), who will perform such customization (Respondent/Sub-contractor/City, etc), and the cost to the City for the vendor to maintain such customizations during use of the software.

Customization/Configuration	Level of customization anticipated	Performed By	Price (U.S. Dollars)
Core Software (platform, base functionality, etc.) required regardless of the module(s) implemented			
Portfolio Management functionality			
Space Management functionality			
Facility/Maintenance Management functionality			
Project Management functionality			
Total IWMS implementation			

- Can customization/configurations be self maintained by City? Explain.

- What is the customization/configuration maintenance procedure?

In addition to the direct costs associated with your solution, provide the following additional information:

- Any software (such as Oracle, AutoCAD, etc.) not included in your quote, but required for operation of the product. Each product required to meet the requirements of this RFP must be specifically indicated. Pricing information is optional.

Product	Use	Price (optional)

- Recommended hardware requirements for an implementation that would support the scenario presented. What happens with expanded usage through acquisition, growth, etc? Explain the impact to your recommendation if the scenario were to double. Triple. (System diagrams and supporting materials are welcome and should be attached to the RFP response.)

Hardware	Comments

- Describe any issues or exceptions associated with this quote

Desired Schedule

Your proposal must include a *draft* project schedule (submitted using MS Project) laying out your implementation approach to meet a phased hypothetical deployment of the modules in the following order:

1. Space Management including MAC, strategic planning, and cost allocations
2. Project Management

3. Facility/Maintenance Management

4. Portfolio management including lease administration and strategic planning

This plan will need to delineate the following:

- A complete list of tasks for the successful deployment of your solution to meet the functionality included in this RFP.

- A resource plan that identifies resources required by title, regardless of whether the resource is ultimately sourced by you. Non-Respondent resources do not need to have rates associated with their assignment to tasks, but the scale of their involvement must be noted (Each resource must be assigned to tasks where they are required such that the City can add rates to non-Respondent resources in order to determine a complete cost of implementation).

- Fees for Respondent-provided resources (both those charged out hourly and as fixed expenses) that are included in your services as quoted above must be included in the project schedule such that the total of this plan matches your cost proposal.

Appendix C – Technical Requirements

Please answer all questions below sufficiently to allow the City a complete understanding of your system's capabilities and limitations.

#	Requirement	Vendor Response
Architecture		
T.1	Describe the architecture landscape of the application – two or three tier, fat client or web based, Citrix capable, etc.	
T.2	Can your product run on leveraged versus dedicated servers?	
T.3	Will the application run on virtual servers?	
T.4	What operating systems are supported for specific hardware components? What is your preferred operating environment?	
T.5	Please provide the minimum and recommended server specifications – vendor, type/model, memory size, number of processors, 'Public Network" connectivity, etc.	
T.6	Please provide the minimum and recommended PC specifications.	
T.7	Does the client need to be located close to the server?	
T.8	Is the application scalable if the portfolio doubles or triples? How would we architect accordingly?	
T.9	Is your system capable of handling the entire portfolio effectively and efficiently from one enterprise server and one database instance?	
T.10	What type of network topology is needed (Ethernet, FDDI, ATM, etc.)?	
T.11	What protocol will be used (IP, etc.)?	
T.12	What are your capacity planning/sizing guidelines?	
T.13	Are there any special printer requirements?	
Software		
T.14	What language is your application written in?	

#	Requirement	Vendor Response
T.15	Where do you house the application's business logic (application layer, database, etc.)?	
T.16	What architecture or development technologies are required for this application (Microsoft .NET, J2EE, etc.)?	
T.17	List all software (and versions) that must be licensed to use your application. Can this software be licensed separately (i.e. directly from software company)?	
T.18	Does the application work with anti-virus software?	
DBMS		
T.19	What DBMS and Operating Systems do you support? What is your preferred platform?	
T.20	Do you have tuning queries/procedures for your databases?	
T.21	Do you have recommendations for SGA sizing, table space sizing, overall DB sizing, etc.?	
T.22	What is the cloning process- dev\test refreshes, reporting instance?	
T.23	Explain any specific requirements necessary to accommodate SQL Server or Oracle.	
T.24	Explain any specific requirements necessary to accommodate ODBC connectivity.	
System Performance		
T.25	How is the application monitored for health and performance?	
T.26	Does the system administrator have access to key system performance metrics?	
T.27	Is there end-to-end monitoring capability from the client to server to help determine the distributed component causing issues (client, network, server, database, storage, etc.)?	
T.28	How does your application perform over low-bandwidth connections (dial-up)?	
T.29	Can clients efficiently access the server(s) over WAN segments?	

#	Requirement	Vendor Response
T.30	How are large reports/transactions throttled to reduce network impact?	
T.31	What happens to performance if the original number of concurrent users double or even triples?	
T.32	Describe the network traffic that the software or hardware will generate.	
T.33	Does the application transmit a large amount of information at one time or is it a constant flow?	
Backup & Recovery/Archiving		
T.34	What tools are used for backup and recovery?	
T.35	Do you provide full and incremental backup capability from within the tool?	
T.36	How are hot backups enabled?	
T.37	Have you ever implemented a disaster recovery procedure for your application?	
T.38	What is your solution for archiving data?	
T.39	Can you view the data once it is archived?	
T.40	Can you reload the data once it is archived?	
T.41	Can you report off the data once it is archived?	
T.42	What is the archival criteria (date, time, end of project)?	
T.43	Can the software implement a systematic plan to age data out of the database?	
Reporting		
T.44	Is a report writer provided to allow for custom developed reports? Can these reports be incorporated into the product's menus?	
T.45	What report writing software do you utilize? Is the cost included in your software license or does this require separate licensing? How is the product licensed (e.g. per seat, server, developer, runtime)?	
T.46	Does your reporting platform support Business Intelligence/OLAP capabilities?	

#	Requirement	Vendor Response
T.47	Do you have a separate database for reporting? If so, how do you transport data and keep the transaction database and reporting database in sync? If not, are you concerned that online performance might be impacted by reporting?	
T.48	Do users have to understand the backend database tables to report?	
T.49	Do you provide canned reports?	
T.50	Can reports be executed on a scheduled basis?	
T.51	Can reports be exported to Microsoft Office products?	
T.52	Can you assure data integrity of all reported fields (including all stored, calculated, and summarized data) both on the user interfaces and printed reports? How is this accomplished in your tool?	
T.53	Can you provide access to all data-stored, calculated, and summarized- on a real time basis (no batch processing or delays from internal operations)?	
T.54	Does your system require any user intervention to assure calculated data is up to date? Explain.	
T.55	Does the software have the ability to access and/or run comparative reports against archived data?	
T.56	Can reports be web enabled?	

Customization/Development

#	Requirement	Vendor Response
T.57	What technical skill sets and development tools will be required for analysts supporting the application?	
T.58	Describe the tools and mechanisms used to extend or customize the application.	
T.59	Is the software configurable? If so, explain how this is accomplished in your system (user-definable fields, ability to add new fields, etc). Supplier must guarantee forward compatibility.	

#	Requirement	Vendor Response
T.60	Does your system have the ability to rename, add, move, or delete fields on the user interface? Explain how this is accomplished and the impact it has on the database.	
T.61	Does the customer have the ability to add new functionality (data elements, UIs and business logic) within your system? Explain how this is accomplished.	
T.62	Do you provide access to your system through a portal that allows users to customize what appears on the screen and where it is placed?	
T.63	Can you provide access to html links on your portal/home page?	
T.64	What is the impact to customizations in the event of an upgrade? How are they retained and integrated to the new release?	
T.65	What is your support policy for customizations? What are the supported versus non-supported ways to customize?	
T.66	What is your enhancement request process?	
T.67	What is a typical development staff size for a company of our size to support your solution?	
Vendor Support		
T.68	What type of service level agreements\policies do you offer?	
T.69	What is your problem reporting process and tools (phone, on-line, email)?	
T.70	What is your issue escalation process?	
T.71	Do you have a user group?	
T.72	Describe the technical training classes available.	
T.73	Will you provide technical documentation that includes ERD diagrams, database schema, and table and column level descriptions?	
System Updates (Client and Server)		
T.74	Describe the software update strategy for the application.	

#	Requirement	Vendor Response
T.75	How often are maintenance patches released?	
T.76	What about special one time "hot fixes" for specific issues?	
T.77	During the update process, do you replace individual components or the entire application?	
T.78	After a new release, how long are old releases supported?	
Security		
T.79	How do users authenticate to your application (AD, application directory, other)?	
T.80	Does the application manage authorization internally or can it interface with LDAP (AD)?	
T.81	Explain how your system provides access to the web-browser (thin client) users.	
T.82	Do you support Single Sign on/SSL protocols within your toolset?	
T.83	Can your system be accessed over a VPN running on the public internet infrastructure?	
T.84	How do users access the application/data while outside of the City's network?	
T.85	How granular is the authorization kept? Will it be time consuming to support? Explain.	
T.86	Does your security setup and administration require any direct coding to execute changes? If yes, explain.	
T.87	Do you support field-level security? Explain how this is implemented.	
T.88	Do you provide role base security in combination with geographic location allowing roles to be defined to Create, Update and Delete functionality by user (i.e. Space Planner for a Council District)?	
T.89	Do you have the ability to assign security controls and access rights to stored documents (including CAD drawings) separate and apart from the system level security? Can this be role and/or geographic based?	

#	Requirement	Vendor Response
T.90	Does the application store any confidential or Personally Identifiable Information (PII) that would need to be encrypted at rest or during transport?	
T.91	Do you provide role-based portals/home pages controlled using security access?	
T.92	Can access be assigned to reports through security?	
T.93	Do you employ session time-outs after periods of inactivity?	
T.94	Does your system allow for the placement of a user-defined warning banner when logging into the system?	
T.95	Describe available Security Reports/Controls. Do you have the ability to lock account after x attempts and alert the system administrator? Do you support Local Password rules from new INFOSEC policy, if local passwords are elected?	
T.96	How do you provide information for the following: • User activity • Inactive users • Failed access attempts	
T.97	Can internal application passwords be synchronized via Passport?	
Application Integration		
Note: The City requires integration to SAP.		
T.98	Does the software have the ability to integrate (bi-directional) with other data sources? Are there any built in integrations provided? What methods of custom integration are provided? Explain.	
T.99	Does the application integrate via SAP Netweaver?	
T.100	Does the integration need to be real time or background during non-peak hours?	
T.101	SAP is used for financial management and corporate accounting at the City of Houston. Define your experience with integration to these products for financial data.	
T.102	SAP is used for HR management at the City of Houston. Define your experience with integration to this product for HR data.	

#	Requirement	Vendor Response
T.103	Can the system accommodate SAP codes and descriptions in terms of field sizes?	
T.104	Is your system LDAP Ready certified (*LDAP Certified* and conforming to the LDAP Certified Product Standard)? Can your system import user account information through LDAP integration?	
T.105	Do you support XML, CSV, and fixed length file/message formats for integrated data exchange?	
T.106	Provide a list of all API exit and entrance points contained in the software suite.	
T.107	Explain how you assure data validation, and provide automated exception reporting of non-compliance or rejected data.	
T.108	Describe your integration capabilities with desktop products like MS Word, Excel, Exchange, MS Project, and Visio?	
Document Management		
T.109	Describe how your system handles storage and versioning of Microsoft products (Word, Excel, PowerPoint, etc.)	
T.110	Can a user check in/check out/store documents without going through menu options within these products?	
T.111	Can the user scan in a hardcopy of a document directly into your tool (TWAIN support)? Explain.	
T.112	Do you provide the ability to view documents in their native format without having the original application loaded on the viewer's computer?	
T.113	Describe how documents are searched, indexed and stored (as part of the file system or as a database object)?	

Appendix D – Functional Requirements

Ranking:

Core	**= Core/Required/Mission Critical**
High	**= Extremely important, but can be handled with a work-around**
Nice	**= Nice-to-Have**

Answer each of these questions based on the functionality that is currently available. You must indicate if your answer impacts the price provided above.

General Functionality

#	Requirement	Vendor Response
Performance		
G.1	Is the software package comprised of an integrated suite of applications? List the modules available with your solution. Which are quoted in this RFP response?	
G.2	Is the software package integrated with Web and email interfaces to and from users and customers?	
G.3	Is all data – including any calculations, summaries, and roll ups derived from the data - accessible as soon as it is entered with real time updates that can be viewed by anyone who is an authorized user without requiring user intervention?	
G.4	Does the system provide lookup lists or full text descriptions for all coded data?	
G.5	Is all data implicitly saved when changing UIs, executing actions or accessing sub-functions? If not, how do you assure data is not lost?	
G.6	Does the tool support multiple measuring systems including imperial (feet/square feet) and metric (meters/square meters)? Explain how the data is stored. Can the different systems be changed on the screens and in the reports easily? Explain how this functionality is implemented in your tool.	

#	Requirement	Vendor Response
G.7	Does the system support multiple currencies? If Yes, what currencies are supported? Explain how the user-entered data is stored. (When is the conversion rate applied such as at the time of the transaction, at reporting, billing, payment?) Explain how the currency table is updated. In particular, define the way you address each of the following: 1. Conversion from the original currency to 1 or more other currencies for display on UIs and in reports at the current exchange rate. Must not change the original currency as entered. 2. Conversion from the original currency to one or more other currencies for display on UIs and in reports at the exchange rate or the time the original currency was entered. Must not change the original currency entry.	
G.8	Does your system provide dynamically formatted labels for all UOM, date, language, time and currency fields? (i.e. USD, sq ft, etc.)	
G.9	How many address fields are supported? Do you support U.S & International formats? What is the length of the address fields? How do you handle international phone numbers?	
G.10	Can the system operate in multiple time zones including those outside the continental U.S.? Do you use GMT? Explain how your system accounts for international users.	
G.11	What kind of date formats does the system support? Explain how users in multiple countries can easily identify what format is in use.	
G.12	Provide clear proof of the ability of your system to accommodate and process real estate portfolio data in excess of 30MM square	
G.13	Can the measuring system, currency, language, and other international formats be set at the country level and/or the individual user profile?	
G.14	Does your system recognize and use the MS Windows regional settings for date, time, currency and language settings?	

#	Requirement	Vendor Response
G.15	Does the system provide for electronic (web) customer satisfaction surveys to provide feedback? How are these accessed by people not trained on your product?	
G.16	Does the system provide for electronic (web) surveys for vendors to provide feedback? How are these accessed by people not trained on your product?	
G.17	Does your system support multiple language deployments? What languages? How is this supported by the database? Are there any additional implementation & support requirements with a multiple language solution (i.e. support for international character sets)? Can additional languages be added at a later date? If so, at what level of difficulty?	
Configurability		
G.18	Does the customer have the ability to create multiple user-defined hierarchies – such as geographic, organization, real estate organizational structure - that can be used to group properties, leases, projects, etc? Can the user select which hierarchy they wish to use? Can the tool consolidate and report information at any level of the hierarchy? Explain.	
Help Functionality		
G.19	Do you provide online help customized to match the customer's deployment? Explain how this is created and maintained.	
G.20	Do you provide context sensitive and/or "roll over" help?	
System Administration		
G.21	Describe your system administration tools, particularly the capabilities and ease-of-use features.	
G.22	Do you provide the ability to create and manage a catalog of lookup options and the ability to assign these to any data field?	
G.23	Do you provide the ability to create "snapshots" of all data in the system, archive it and report on/compare against it?	

#	Requirement	Vendor Response
G.24	Does your system allow for the definition of mandatory or required data fields? How is this feature administered?	
G.25	Describe & provide examples of any reports the can be used to better administer the system & manage data quality for the system & its interfaces.	
User Access		
G.26	Do you provide real-time graphical views of Key Performance Indicators (KPIs), metrics, and other performance measures on the home page/portal?	
G.27	Do you provide an administrative portal/home page that supports the administration, maintenance and operation of the overall solution?	
Workflow & Approval Notifications		
G.28	Do you provide the ability to establish and implement customized workflows for approval, action, distribution, and routing - for managing project/process life-cycles?	
G.29	Does your system monitor and send automatic notifications when items need actions (user must be able to pre-define)?	
G.30	Do you provide the ability for a user to re-route/delegate an action to another function or individual?	
G.31	Can you automate standardized processes with both pre-defined and user-defined routing? Can the system automate escalations when actions are not performed within a designated timeframe?	
G.32	Do you provide the user the option to select how they will receive notifications - email and/or portal/web queue?	
G.33	Can you initiate approvals according to the customer management's hierarchy, job function and/or situation specific rules?	
G.34	Can the software generate email and/or other forms of notification of receipt and status of MAC requests to customers? Give examples of options.	
G.35	Can your tool interface corporate portals (external to your tool) for notifications?	

#	Requirement	Vendor Response
G.36	Do you provide ready to use and adaptable "out of box" business processes? Explain.	

Audit History

#	Requirement	Vendor Response
G.37	Do you provide the ability to track individual user activity within the system? Explain this feature.	
G.38	Can you produce audit logs for edits of data? (If YES, can these be viewed from within the application? Is the log tagged with date, time and user-ID?)	
G.39	Do you have the ability to store/access historical snapshots of user defined data sets (e.g. quarter end, year end, etc.)?	

Reporting

#	Requirement	Vendor Response
G.40	Do you provide the ability to create and manage standard reports/templates with pre-defined data elements (e.g. Space and Headcount Summary, Lease Summary, Building Detail, Real Estate Summary and Real Estate Detail)?	
G.41	Does your reporting system provide the ability to run parameter driven reports on standard templates (e.g. parameters = geography, business unit/organization, type of space)? Explain.	
G.42	Explain your approach to reporting, with particular emphasis on our ability to generate reports based on: • Combination of multiple data elements stored in various components/business objects/modules of your system • Ability to filter on any data component within the report • Ability to save report profiles with their parameter settings for easy future execution of the same report.	
G.43	Does the system provide the ability to run pre-defined standard reports on a given schedule?	
G.44	Can a user run all reports on demand against the live database? (No stored or batch report components required?)	
G.45	Can a user access reports by pre-defined category and types from their portal/home page?	

#	Requirement	Vendor Response
G.46	Can a user run reports (such as comparative analysis) against both current data and archived data at the same time?	
G.47	Can you import and export data to Microsoft products (Excel, Project, Word, PowerPoint, etc.)?	
G.48	Define the method your system utilizes to allow user-defined flexible roll-ups of data.	

Spatial Data Reporting

#	Requirement	Vendor Response
G.49	Except for those few individual who actually have to manipulate drawings, the system must allow dynamic viewing of drawings, over the internet, without the use of a CAD product.	
G.50	Can reports, query results, drawings, and schematics be printed to screen, file, printers or plotters?	
G.51	Can a page preview mode be invoked to allow the user to check the final outcome before going to the printer?	
G.52	Is there a built-in graphing and charting capability available with the system?	
G.53	Can ad hoc graphical reports be added to a report menu for users on an ongoing basis?	
G.54	Can calculations be performed in reports (e.g., determine the percent of total rentable floor space occupied by each department)?	
G.55	Does the system have the ability to draw on information from all systems modules and assemble into custom report and formats?	
G.56	Does the system provide the ability to report from multiple locations within the database tables concurrently?	
G.57	Do CAD Drawings have the ability to display dynamics data generated by a query? (e.g., total area occupied by each department)	
G.58	In viewing/printing a floor drawing, can "layers" (walls, furniture, etc.) be selected or deselected without recreating the drawing?	

#	Requirement	Vendor Response
G.59	Provide examples of out-of-the-box reports & pre-prepared "ad hoc" reports. Can these be copied and modified to create user-specific reports?	
G.60	Does the system have the ability to represent multiple floors or buildings on a single report and/or from a single database query?	
G.61	Does the system provide a method of grouping related reports together within the menu structure for ease of use?	
Document Management		
G.62	Do you provide the ability to incorporate and track documents, drawings, contracts, leases, etc. associated to buildings, land, leases and contracts?	
G.63	Do you provide the ability to download documents, drawings, contracts, leases, etc. to access, view and edit - depending on the user's access rights?	
G.64	Describe the process your system employs to assure scanned documents are stored properly in your tool.	
G.65	Do you provide the ability to automatically store versions of documents, indicating which are current, dates replaced and by whom and ability to retrieve previous versions	
G.66	Do you provide the ability to allow users (depending on access rights) to check out documents to edit, locking out all others from ability to check out the document until the first users checks the document back in? (Need the ability to see who has a document checked out.) Define the way you guarantee the check in/out process is synchronized.	
G.67	Describe the process your system employs to assure email messages are stored and associated to the appropriate buildings, land, leases, and contracts?	
G.68	Do you provide the ability to identify documents/ document types that require approval before being posted as "live"?	
Decision Management		

#	Requirement	Vendor Response
G.69	Does your system support a communications logging tool to allow the tracking of email, faxes, meeting notes, telephone conversations, etc.?	
G.70	Do you have the ability to attach documents to the communication log entries?	
G.71	Describe how you log and track communications associated with assets (buildings, land, spaces, etc) and contracts. Are all communications stored in a single repository that can be viewed and reported against?	
G.72	Does the system provide a secure discussion thread for tracking discussions about a selected topic?	

Real Estate/Portfolio Management

Item #	Requirement	Vendor's Response
Lease Administration		
R.1	Do you provide the ability to centrally store and track lease related information (lease abstract data)?	
R.2	Do you have the ability to automatically route Desktop Obligation Reviews (action review for decision such as renewal, termination, etc.) for approvals?	
R.3	Can the user search for, or drill down to, a particular lease record to update and maintain the data?	
R.4	Does your system provide the ability to flag upcoming critical dates or required actions (both user and pre-defined) for a lease?	
R.5	Explain how you track amendments to a lease already stored in your system.	
R.6	Can you track electronic documents and associate them to a lease?	
R.7	Do you support email notifications of trigger events?	
R.8	Do you provide the ability to track Gratuitous versus non-gratuitous leases?	
R.9	Do you provide the ability to track who provides utilities (city, lessor, etc.)	
R.10	Do you have the ability to track public sector specific data elements, such as council district, department owner, facility usage, etc.	
R.11	List the data elements you track as part of a lease abstract. Define how the data is managed and any flexibility you provide in adding/changing this list.	
R.12	Can you associate tenant improvement project records (including budgets, capital plan and depreciation) to a lease record?	
R.13	Does your system have the ability to assign leases to customer cost centers? Can you assign cost centers to leases?	
R.14	Explain how you track one time lease costs (such as Tenant Improvement & Landlord allowances), including budgets and depreciation.	

Item #	Requirement	Vendor's Response
R.15	Explain the process you use to review and approve a lease abstract prior to activating the lease.	
R.16	Do you have the ability to bookmark (or index) clauses, options, and/or data fields in the database to specific section(s) in the actual lease document(s)?	
R.17	Do you have the ability to establish lease-specified space measurement independently of drawing-specified measurements (such as rentable, usable)?	
R.18	Do you have the ability to differentiate between 1st party, 3rd party, and internal tenancy leases?	
R.19	Do you provide an intuitive method of associating a lease to a building, multiple buildings or a portion of a building? Explain.	
R.20	Can a user create and manage parent/child relationships between master leases and sub-leases?	
R.21	Do you provide an intuitive method of associating/displaying a lease and/or occupancy information on a CAD drawing?	
R.22	Can you automatically calculate index-based rent increases? What Indexes do you support (such as CPI)	
R.23	Do you provide the ability to reconcile square footage between the lease and the actual space as measured in the space administration system?	
R.24	Do you provide the ability to track audit rights?	
R.25	Does your system support GIS functionality (reference mapping) to automatically place properties based on locational information stored in the database? Do you have existing integration to ESRI?	
R.26	Explain how you provide assess to clients, including any security that restricts viewing and limits the fields available for viewing.	
R.27	Do you support triggers for non-contractual events that notify client departments?	
Acquisition Management		

Item #	Requirement	Vendor's Response
R.28	Do you provide the ability to create, assign, and track tasks that are associated with the search and acquisition of new space (leased or owned) - an acquisition project? Specifically need to track actions and responsible parties for such things as surveys, appraisals, legal reviews, etc.	
R.29	Do you allow assignment and tracking of lease projects by various types of geographic grouping (council district, Key Map, etc)	
R.30	Do you provide the ability to track the following items during the lease due diligence phase? — Seller's name — Purchasing department — Property description and legal description — Purchase price — Effective date — Project timeline including action to be completed, date due and responsible party — Feasibility period that tracks due diligence activities, due dates, etc — Earnest Money data including deposit type, amount, due date as a relationship to other tasks, etc. — An actual Closing Date or date based on a relationship to another task — Comments — Presenter name and date — Approver and data	
R.31	Does a user have the ability to combine individual transactions into groupings, or scenarios, to create detailed models? Does your system have the ability to make comparisons between various acquisition scenarios?	
R.32	Do you provide the ability to rank various performance factors in order to assess how well the scenario meets those factors?	
R.33	Define other features your tool provides for the management of the acquisition of space.	

Item #	Requirement	Vendor's Response
R.34	Do you have the ability to maintain legal commentary relevant to a specific deal (purchase and sale dates, "Project File" concept)?	
Disposition Management		
R.35	Do you provide the ability to create, assign, and track tasks that are associated with the disposition of space or land?	
R.36	Can you provide functionality around special provisions, such as tracking sale to non-profits and the legal restrictions placed on use in such a deal?	
R.37	Can you track steps in the bidding process for a property sale?	
R.38	Does a user have the ability to combine individual transactions into groupings, or scenarios, to create detailed models? Does your system have the ability to make comparisons between various disposition scenarios?	
R.39	Do you provide the ability to rank various performance factors in order to assess how well the scenario meets those factors?	
R.40	Define other features your tool provides for the management of the disposition of space.	
Portfolio Master Data		
R.41	Describe how a user gains access to a particular facility record (a building or other structure) to update and maintain the data.	
R.42	Describe how a user manages data for a particular building (an independent facility that could be managed and operated independently from other facilities on the site) and a parcel of land that may be a portion of a larger piece of land.	
R.43	Do you provide the ability to track and manage a building's status (such as proposed, approved, open, sublet, vacant and disposed)? Are these states user definable?	
R.44	Does your system have the ability to identify if a building is owned or leased?	
R.45	Does your system allow the user to either search for or drill down to a particular lot/land or building record?	

Item #	Requirement	Vendor's Response
R.46	Explain how you deactivate property and declare it surplus? What notifications are generated by this action? Can you tag and categorize a property with user-defined tags (such as "Pending Disposal" or "abandoned")?	
R.47	Can your system send out notices based on a status change that tells other groups to stop performing all services?	
R.48	Do you provide the ability to associate Lease/Ownership contracts to buildings?	
R.49	Do you track an asset's value, such as book value and market value? Describe what you track.	
R.50	Do you have the ability to change headcount totals (by business group) in facilities that do not track individual employees to the space level (buildings not linked to CAD)?	
R.51	Do you provide the ability to change space allocations by business groups within buildings that do not track individual spaces to the space level (buildings not linked to CAD)?	

Location Information

Item #	Requirement	Vendor's Response
R.52	Do you provide the ability to create/manage a tiered geo-political location structure in which the property/building resides (e.g. County, Metropolitan Area, City, Campus, and building)?	
R.53	Does the system allow the grouping of multiple buildings and or land records based on a specific user choice (e.g. to create a campus or service area)? Explain.	
R.54	Do you have the ability to track a building or land record financial commitments (such as tenant and landlord insurance details)?	
R.55	Do you have the ability to assign parking spaces to an individual or organizational unit?	
R.56	Can you charge back to an organization or individual for parking?	

Manage Contacts

Item #	Requirement	Vendor's Response
R.57	Can your system manage contact information for people associated with roles on a building? Describe.	

Item #	Requirement	Vendor's Response
R.58	Do you provide the ability to associate employees, vendors and/or other contacts with a property and a contract, such as a lease or owned real estate contract?	
R.59	Can your system provide the ability to track/manage all key information about contacts that are not downloaded from other sources (i.e. user entered)?	
R.60	Do you provide the ability to associate relationships between a contact and multiple buildings/leases?	
R.61	Does your system provide the ability to track/review all key information about both internal and contract personnel data (such as who, what when for something like title company, surveyor)?	
R.62	Do you provide the ability to track/manage all key information about service provider and vendor companies?	
R.63	Can users associate specific roles to personnel in specific companies?	
Owned Real Estate Contracts		
R.64	Do you provide the ability to centrally store and track ownership contract related information (for both land and building records)?	
R.65	Do you have the ability to track associative hardcopy reports such as appraisals, environmental studies, etc and where it is stored?	
R.66	Do you provide the ability to associate employees, vendors and/or other contacts with an ownership contract?	
R.67	Do you provide the ability to automatically update the status of a building or piece of land when a contract is completed and identify any remaining obligations?	
R.68	Can you track electronic documents and associate them to an ownership contract such as surveys, contracts, environmental assessments, cover letters, etc)?	
R.69	Explain the process you use to review and approve a contract abstract prior to activating the contract.	

Item #	Requirement	Vendor's Response
R.70	Do you provide an intuitive method of associating a contract to a building, multiple buildings or land? Explain.	
R.71	Can the user search for, or drill down to, a particular ownership record to update and maintain the data?	
Internal Occupancy Agreements		
R.72	Do you provide the ability for a business unit to see what spaces/services they are being charged within a particular occupancy agreement? Can they see the spaces by building (potential of multiple occupancy agreements)?	
R.73	Do you have the ability to track internal agreements (similar to informal sub-leases, but distinguished from true sub-lease contracts) signed between the corporate real estate group and other departments? Does your system support the creation of these internal agreements?	
R.74	Do you provide the ability to roll-up rental charges contained in the occupancy agreements in order to create a cost allocation by business unit?	
Relationship Management		
R.75	Do you provide the ability to maintain a complete list of contacts by business unit, vendor, supplier, etc?	
R.76	Do you have the ability to track issues important to the customer and contact, and provide follow-up target dates/trigger dates to remind the relationship manager?	
R.77	Do you have the ability to track activities/projects for a given relationship manager and associate these to the appropriate building or contract data in the other areas of the application?	
R.78	Do you have the ability to associate documents to a relationship record?	
R.79	Do you provide the ability to maintain detailed records about contacts, including notes and contact history?	
R.80	Do you have the ability to associate emails to a relationship record? What email systems do you integrate with?	

Item #	Requirement	Vendor's Response
R.81	Do you have the ability to select all or some of a relationship manager's contacts and issue an email message to them? Can a document be attached to the message?	
R.82	Do you support the ability to notify the appropriate relationship manager of all issues raised by or for their customers?	
R.83	Can you deliver issue resolution status and explanations to the customers?	
Transaction Tracking		
R.84	Can you track core information about acquisition and disposition projects, such as: — Project name — Project Address — Project type — Client department — Primary contact and contact information — R.E. staff assigned — Asset type (land, building, etc.) — Actions & status of those actions (title work, survey, appraisal, environmental, bid advertisement, etc) — Action taken — Fund disposition — Comments	

Space Management

#	Requirement	Vendor's Response
CAD Support		
S.1	What CAD products (and which versions) do your solution support?	

#	Requirement	Vendor's Response
S.2	Does the system allow users to create specialized CAD drawings with text dynamically placed from the database? (Example: Room numbers, room area, room type, department, etc.) - How is this achieved? - Can the displayed data be customized (i.e. display different database fields and concatenation of fields) - If so, what kind of user experience would be required (e.g. power user, casual user, etc)	
S.3	Does the system allow users to create specialized CAD drawings with room perimeters dynamically filled with color based on criteria from the database? Does the system provide a dynamically created legend to identify colors? (Example: Identify all departments on a floor plan by filling rooms with unique colors.)	
S.4	Can the software import CAD drawings from other vendors into the supported CAD drawings format?	
S.5	Does the system require the drawing to be linked to the space database to display data, or do you embed data in the drawing?	
S.6	Is the space database used for the drawing environment the same one that is accessed through non-CAD forms and/or reports?	
S.7	Is the drawing automatically updates when data about a linked object is changed in the database (excluding the shape or size of the polyline)? Does this update take place upon opening the drawing or does the system require the drawing to be open at the time the database change is made? Explain your process.	
S.8	Is the database automatically updated when a linked object is moved in a drawing?	
S.9	Is the database automatically updated when a shape of a linked space is changed on the drawing?	
S.10	Do you provide an ability to view drawings in read-only format without the need for CAD software (e.g. do you provide a free viewer with your application)?	
S.11	Explain how the database and drawings are kept synchronized.	

#	Requirement	Vendor's Response
S.12	Does the system provide any diagnostic utilities for the drawing environment? (Audit a drawing, for example, to determine if all spaces in the drawing have a corresponding database record, compares the area of a floor with the total of the areas of all the spaces, etc.) Explain.	
S.13	Explain the process required to regenerate graphics (CAD drawing) reports after changes are made in the database (e.g., departmental reassignments).	
S.14	Can asset and equipment lists for each space be obtained through the CAD drawing, such as computers? Explain.	
S.15	Can the space inventory database be created and maintained without utilizing CAD functionality? Can some spaces be maintained this way and others through CAD drawings in the same database instance?	
S.16	Can the system's drawings be accessed for review, markup and plotting by both local and remote users?	

Drawing Management

#	Requirement	Vendor's Response
S.17	How do you upload CAD files from an outside provider into your application?	
S.18	Do you provide the ability to store other types of graphics (photos, etc.) in the system? Can these be associated with CAD drawings or building records?	
S.19	Does your system provide the ability to maintain a library of CAD drawings (historical and current with version control while tracking who checked it out & when it was accessed)?	
S.20	Does your system have the ability to track the status of a CAD drawing (check-in, check-out, active, old, etc.)?	
S.21	Describe what attributes/meta data you track about drawings in the Drawing Management system. What type of reporting is available on this data (who made the change, what was changed, etc)?	
S.22	Do you provide the ability to capture notes and a discussion thread relating to a drawing (CAD) file?	

#	Requirement	Vendor's Response
S.23	Do you provide the ability to track drawings other than space utilization – such as HVAC, plumbing and electrical? How do these additional drawings impact performance?	
S.24	Does your system have the ability to assign a responsible group or individual as the "Owner" of a CAD drawing? What restrictions and/or privileges does this carry?	
Space Standards		
S.25	Explain how you enforce space planning standards to provide an optimum and consistent work environment. Include the method you utilize to prompt for and override space standards controls. Can they differ by location?	
S.26	Can you track, maintain and apply user-defined standards for both assignable and common spaces? Can these standards be over-ridden if necessary?	
S.27	Can you run a comparative space utilization report of actual assignments against standard by floor, building, organization, entire portfolio, etc.?	
S.28	Can you auto-assign space based on a space's standard and an employee's classification?	
Space Requests		
S.29	Do you provide easy to use, self instructional, web-based space requests for self-service space requests? Explain what types of requests you support (new employee, move, employee termination, group move, etc.)	
S.30	Do you allow for the management of all requests for space and the routing for approvals required to assign a space to an individual or function? What actions are available to the approvers?	
S.31	Explain what information is available on the request, including contact information for multiple contacts.	
S.32	Do you provide the ability to associate individuals to be impacted by a MAC to the request? Explain.	

#	Requirement	Vendor's Response
S.33	Do you provide the ability to automatically identify and associate other service groups (IT, telephone) to a MAC request based on the request parameters? Explain.	
S.34	Explain the process your system supports/enforces for a request including all statuses it goes through.	
S.35	Does your system support user-defined notifications at pre-defined steps in the request process (i.e. upon receipt, when approved, when scheduled, etc.)?	
S.36	Does your system provide an easy to use method for the requestor to attach a document or drawing in support of the request?	
S.37	Can MAC request forms be tailored to the type of service requested (e.g., by prompting for account information only if service is billable, MFD only, phone only, etc.)?	
S.38	Does the MAC request notification include a unique work order number, the person assigned to the work order, their telephone number and email address?	
S.39	Are incoming MAC requests time stamped?	
S.40	Do you provide the ability to make changes to a request and track the author of the changes plus an audit trail of the changes?	
S.41	Do approved requests automatically initiate the MAC process? Explain.	
S.42	Does your system provide an easy to use method for the requestor to "redline" a drawing and/or attach a scanned/created image in support of the request?	

Space Inventory Management

#	Requirement	Vendor's Response
S.43	Can the software maintain a database of buildings, rooms, and other spaces, as well as information about those spaces, their furnishings, and inhabitants?	
S.44	Does the software include graphical representations of buildings, rooms, other spaces, furnishings, and inhabitants?	
S.45	What building characteristics does your system track? Does this include space characteristics? Can they be defined, or are they pre-defined by the system?	

#	Requirement	Vendor's Response
S.46	What location characteristics does your system track (Key Map designations, City Council districts, etc)?	
S.47	Does your system support integration to any GIS functionality? What GIS systems do you support?	
S.48	Explain how your system supports a flexible user-defined locational hierarchy. List any limitations to this hierarchy (size, levels, structure of the levels, etc.).	
S.49	Explain how your system supports a flexible user-defined company-wide organizational hierarchy. List any limitations to this hierarchy (size, levels, structure of the levels, etc.). Does your system have the ability to link to an outside HR database for this hierarchy? List examples of such an integration.	
S.50	Can the system capture space usage or occupancy by personnel?	
S.51	Can space allocation be assigned by either the occupant's organization or directly to an organization (such as for reserved space)?	
S.52	Can the system accommodate multiple users or proportional occupancy of space (i.e., "shared spaces")?	
S.53	How does your system address the "People Served" concept, i.e. tracking of people who do not have a dedicated space?	
S.54	Explain how proportional usage can be allocated - percentage of use, actual area used, shift or time allocation?	
S.55	Can usage chargeback costs be calculated based on organization, activity, and/or personnel allocations of space?	
S.56	Does the system provide the ability to associate billing/accounting IDs to spaces (to facilitate accounting functions for chargeback)?	
S.57	Does the system provide the ability to compare space capacity to actual usage? How is "capacity" established by the system?	
S.58	Does the system provide the ability to compare occupancy status indicator to actual occupancy (e.g., "vacant" with assigned users)?	

#	Requirement	Vendor's Response
S.59	Does the system provide the ability to search and view detail records by drilling-down from buildings to floors?	
S.60	Does the system provide the ability to search and view detail records by drilling-down from floors to spaces?	
S.61	Does the system provide the ability to roll-up building area and headcount totals throughout the organizational hierarchy?	
S.62	Do you allow spaces to be identified as vacant? What vacancy categories do you support (.e. vacant assigned, vacant unassigned, vacant unassignable, etc).	
S.63	What personnel characteristics (such as ergonomic profile) does your system maintain? Can these be edited?	
S.64	Does the system allow the use of any measurement standard (e.g., BOMA, IFMA, corporate-defined, and/or a combination) to determine the area of spaces? Can the system support converting data from one standard to another? Can your system support more than one standard simultaneously?	
S.65	Does your system support a separate user-definable organizational structure for the real estate department?	
S.66	Do you provide the ability to maintain security elements relating to a space (assets and access features)? Can this be enabled or disabled by site?	
S.67	Does the system provide the ability to track non-building entities such as grounds, antennas, structures, utilities or parking lots?	
S.68	Can you add "downtime" to spaces based on MAC requests (e.g. label a space unavailable for a specified number of days after a move to allow for reconfiguration – assigned by space type and MAC request type)?	
S.69	Explain how your system tracks and supports emergency usage (business continuity) information.	
S.70	Can you capture people records from a security system as well as the corporate HR system?	

Asset Tracking

#	Requirement	Vendor's Response
S.71	Does the system track equipment identified by a unique code (tagged) such as serial or property number?	
S.72	What equipment characteristics does your system track?	
S.73	Can equipment be assigned to employees?	
S.74	Can equipment be assigned to rooms?	
S.75	Can equipment be assigned to departments?	
S.76	Can the system utilize a bar code system and/or mobile devices for inventory or asset management?	
S.77	Does the system track non-tagged equipment?	
S.78	Can the system track component assemblies for equipment? Can it utilize Smart Tags to tie drawing components to inventory?	
Move/Add/Change (MAC) Management		
S.79	Does the system create move reservations? Can it do this even if the space is currently occupied, but planned to be vacant?	
S.80	Does the system logically prevent moves into and assignment of space that will be occupied at the time of the move? Does it prevent moves into non-personnel space?	
S.81	Can your system schedule moves based on loads not only from within the IWMS system, but also from interfaces to telephony and IT systems?	
S.82	Explain how your system supports the management of MAC requests, including prioritization and scheduling.	
S.83	How are open MAC requests tracked in your system?	
S.84	What type of MAC lifecycle analysis is available? Does your system allow for issues/actions to be prioritized and assigned as a result of the analysis?	
S.85	Can the system reserve blocks of space (i.e. vacant reserved)?	
S.86	Can the system create alternative move scenarios (box moves)?	
S.87	Can your system support trial layouts in the tool (change configuration of the space)?	

#	Requirement	Vendor's Response
S.88	Can the system group multiple personnel and locations under one move project and/or scenario?	
S.89	Can the system track move costs? Explain.	
S.90	Does the system automatically update all location information for equipment when the move is completed?	
S.91	Does the system automatically update all location information for personnel when the move is completed?	
S.92	Does the space planner have the ability to define default information (e.g., change the occupancy code and organizational assignment of the vacated space) for locations affected by a move transaction?	
S.93	Can the system automatically update status information for the associated spaces when the move is completed?	
S.94	Can the system automatically update charge-back and organizational assignments in the database subsequent to a move?	
S.95	Does the system maintain a historical record of move transactions?	
S.96	Does the system recognize the difference between cancelled and closed MAC requests? Explain how you handle each.	
S.97	Can the user define default information (e.g., change the occupancy code and organizational assignment of the vacated space) for locations affected by a move transaction?	
S.98	Can business rules be applied to pipeline management (such as assigning MAC types and having the system determine how many can be accomplished in a given time period)?	
S.99	Do you provide the ability to report churn measurements by region, state, property, floor, department, etc. Is this handled through a space attribute or categorization/classification?	
S.100	Does the system allow assigning more than one space to the same person? Can one space be designated as "Primary"?	
Space Allocation and Chargebacks		

#	Requirement	Vendor's Response
S.101	Describe how your system supports roll up by user-defined organizational structures (business segment, unit, etc.)	
S.102	Describe how you can calculate differential costs based on space use (such as occupied versus vacant space).	
S.103	Can the system track space usage or occupancy by organizational department (i.e., usage by a department other than the one assigned)?	
S.104	Can the system track space usage or occupancy by functional activity or project (i.e., usage by an activity other than the one assigned)? Does the system accommodate an unlimited project hierarchy?	
S.105	Describe the flexibility within your system to set allocation budgets – such as monthly, quarterly, annually. How are the budgeted space allocations retained versus the live database that reflects on-going space changes?	
S.106	Describe how your system supports roll up by space use, classification and type. Include how you support floor common, building common and campus common spaces.	

Room Reservations/Conferencing

#	Requirement	Vendor's Response
S.107	Is the system capable of reserving designated spaces (conference rooms, etc.) over the web?	
S.108	Does the system keep track of capacity utilization of requested space? Is there any capability around tracking & monitoring actual usage?	
S.109	Does the system provide the ability to request types of space by functionality (size, seating capacity, A/V equipment, phone number, etc.) or location (within department, on certain floor, etc.)?	
S.110	Can users view who has a space reserved for a given time and duration over the portal?	
S.111	What fields does the system track for meeting details (e.g. location, date, time, duration, participants, externals/visitors, confidentiality)?	

#	Requirement	Vendor's Response
S.112	Can access be restricted for designated rooms (to designated users, departments, etc.) for view & update?	
S.113	Does the system support the user making multiple & recurring bookings?	
S.114	Does the system support more than one user being able to make a booking on behalf of a designated user, specifically an administrator?	
S.115	Is there search functionality? What search criteria does it use (e.g. can it find a meeting room, booker, participant)? Can it display room availability for specific parameters (e.g. building, room type, date, time)? What kind of logic does the search use?	
S.116	To what extent is this functionality integrated with the rest of the solution, such as space management and space allocations?	
S.117	Does the system currently integrate with any external systems for organizational hierarchy, administrator relationships, cost center, purchasing, and/or phone book? What systems do you support (e.g. Outlook?) What fields are tracked in the user profile for either option?	
S.118	Does the system integrate with Microsoft Outlook? Explain.	
S.119	Explain what kind of knowledge transfer support you provide for this tool for end users & key users (e.g. on line modules, video cams, on line help, etc.). Is this bundled into your tool training?	
S.120	Does the system support policies associated with who can edit reservations and when edits are to be allowed? Explain.	
S.121	Does the system provide controls around duration & frequency of bookings and time limits on advance bookings?	
S.122	Does you system support automated notifications for attendees? Are there limits on the number of people included in e-mail notifications?	
S.123	Can the tool provide a plan to show meeting room layout & equipment?	

#	Requirement	Vendor's Response
S.124	How many organizational tiers can the reservation system support (e.g. global, regional, country, building, room)?	
S.125	Can access to cancel another user's booking be restricted to specific "key users"?	
S.126	If a Key User cancels a booking can it trigger email notification to the users impacted for cancelled & new booking?	
S.127	Does the system track history, changes & previous values so that if a key user changes a booking in error, that user can search for the booking for correction from system data? Explain.	
S.128	Does your system provide reporting capabilities for such items as: • Room usage • Autobooking versus other booking (such as through a meeting planner)?	
S.129	Can the tool provide a room locator on the web for each meeting room?	
S.130	Can rooms be blocked for reservations limited to a floor?	
S.131	Does the system support internal billing for meeting room utilization by e.g. cost center? Does it support rules that eliminate the charge if it is cancelled within certain terms? Explain.	

Ergonomics

#	Requirement	Vendor's Response
S.132	Can an individual employee submit a request for an ergonomic assessment through your solution?	
S.133	Does your system provide a calendar of available ergonomic assessment timeslots for the individual employee to make an appointment for an assessment?	
S.134	Does the system allow for ergonomic requests to be submitted for workspace adjustments?	
S.135	Does your system track ergonomic properties and associate them with space and space assets (e.g. desktop height, chair type, etc)?	
S.136	Do you have the ability to integrate to external ergonomic tracking systems?	

#	Requirement	Vendor's Response
S.137	Can your system track ergonomic attributes associated to people – an ergonomic profile?	
S.138	Do you provide the ability for individual employees to access their profile?	
S.139	Does you system associate user ergonomic profiles to move work orders?	

Scenario Planning

#	Requirement	Vendor's Response
S.140	Does your system provide the ability to create what-if scenarios (stack and block) for any number of possible space plans without affecting the current space records?	
S.141	Do you provide the ability to create multiple floor plan options in order to compare space and cost efficiencies, and share them over the web?	
S.142	Do you provide the ability to select one of the what-if scenarios/floor plans created and automatically create all necessary move request(s)?	
S.143	Do you include in your stack and block functionality, the ability to automatically model adjacency models based on a user-defined adjacency matrix.	
S.144	Do you provide the ability to generate various building cost models/reports based on scenario plans to make decisions on what is cost-effective?	
S.145	Do you provide the ability to rank various performance factors in order to assess how well the scenario meets those factors?	
S.146	Do you utilize any industry pricing models (i.e. R.S. Means) to estimate costs for a scenario?	

Audit Functionality

#	Requirement	Vendor's Response
S.147	Do you provide the ability to track spaces by responsible party independent of other such parties (i.e. track by client, relationship manager, space planner, move coordinator, business manager, etc?)	
S.148	Do you provide audit reports graphic and/or tabular) of space assigned to a responsible party? Do these reports indicate occupants by name and organization assignment? Does it show vacant space?	

#	Requirement	Vendor's Response
S.149	Do you allow "Auditors" to update space changes that do not make physical changes to the drawings?	
S.150	Do you allow "Auditors" to submit space changes to a drawing "gatekeeper" electronically for changes that do make physical changes to the drawings?	
S.151	Define any addition audit functional you provide around space management.	

Project Management

#	Requirement	Vendor's Response
Project Request & Approvals		
P.1	Do you provide the ability to capture new project requests and update status during the life of project (e.g. pending, approved, rejected, etc.)?	
P.2	Do you provide the ability to prioritize and classify projects?	
P.3	Do you have the ability to queue backlogged or delayed projects? Explain.	
P.4	Does your system allow for clients to approve and review project request (status and information) online?	
P.5	Describe how you track electronic routing of job requests to both internal and external associates for approval and upload to a central repository.	
Project Collaboration Management		
P.6	Can you link to a Fixed Asset system (SAP) to view and report on building assets?	
P.7	What benchmarks ($/FTE or $/square foot, project type) do you provide out of the box?	
P.8	Do you have the ability to provide and standardize project management forms and reports (change, risk, timeline, scheduling, resources	
P.9	Can you provide access to the latest city forms through your system.	
P.10	Do you have the ability to track benchmarks and explanations (e.g. construction delays, cost overruns, etc.)?	

#	Requirement	Vendor's Response
P.11	Explain how your system supports the processing of vendor change orders, track internal change orders, and track both through a final approval or rejection?	
P.12	Can you explicitly include or exclude change orders in your job cost forecasts?	
P.13	Do you have the ability to track FF&E materials to Lines of Business and individual space?	
P.14	Do you have the ability to allow but restrict access to sub-sets of the data for client departments or outside service providers?	
P.15	Can the user track FF&E materials for some projects but not on others?	
P.16	Do you provide the ability for team members to share files, conduct discussions, issues requests, route documents for review, and/or approval and generally conduct business electronically?	
P.17	Describe your ability to track and version construction bidding and contract documents.	
P.18	Do you have the ability to track Meeting Minutes online by job?	
P.19	Do you have the ability to archive progress photos, drawings and other documents online?	
P.20	Explain your collaborative work environment for project coordination.	
P.21	Do you have the ability to post drawings and allow user to add notes or "redlines" to the drawings on line?	

Project Administration

#	Requirement	Vendor's Response
P.22	Do you provide the ability to track projected and actual cost from a user-defined list of budget items? Can you use historical data by project type and scope definition to create budget costing for a new project (model project budgets)?	
P.23	Do you provide the ability to define a project schedule and calendar within your tool?	
P.24	Can you designate a "pre-funding" (pre-development) project and transfer to a regular project once funding is approved?	

#	Requirement	Vendor's Response
P.25	Can your system support text space for defining project scope and other project characteristics including comments? Define capabilities.	
P.26	Do you provide the ability to search for a specific project? Can a user view a listing of all projects and their status?	
P.27	Do you provide the ability to prioritize pending projects within the system?	
P.28	Do you provide the ability to create and track progress on tasks, including approval and milestone tasks?	
P.29	Do you provide the ability to track personnel and external vendors/contractors and their assignments to tasks?	
P.30	Do you provide the ability to track work orders assigned to project team members and invoice against those work orders?	
P.31	Do you provide the ability to select a specific project and view all details on the project?	
P.32	Do you provide the ability for the project manger to assign team members both from internal staff and external collaborators?	
P.33	Do you provide the ability for a project manager to assign tasks to team members and define details bhy level of effort?	
P.34	Do you provide the ability for project team members to access their tasks? What actions are the team members allowed to perform (accept a task, delete a task, complete, a task, assign a task, etc.)?	
P.35	Do you have the ability to monitor tasks and automatically raise risk-levels (missing deadlines, exceeding budget, etc.) based on embedded criteria?	
P.36	Do you provide the ability to validate that the appropriate task and approvals have been completed for each milestone of a project?	
P.37	Do you provide the ability to view task and status?	
P.38	Do you provide a bi-directional link between your project management functionality and standard PM tools such as Microsoft Project?	

#	Requirement	Vendor's Response
P.39	Do you provide the ability to create and manage templates for various project types? What is included in the template?	
P.40	Do you provide the ability to associate and access electronic documents that are important to the project (CAD drawings, contracts, task orders, change orders, etc.)?	
P.41	Can your system integrate project funding requests to the annual capital plan and other 3rd party job tracking systems?	
P.42	Can your system differentiate costs by budgeted, approved, forecasted, actual?	
P.43	Can your system differentiate schedule by budgeted, approved, forecasted, actual?	
Job Costing & Project Closeout		
P.44	Can you assign jobs to a location (building and/or floor)?	
P.45	Can you link a job to a Department using a company's hierarchy coding structure?	
P.46	Can you link a project to one or more sub-projects each with one or more funding sources? Define the system's flexibility in this area.	
P.47	Describe your ability to capture the asset cost basis when an asset moves from CIP to fixed assets.	
P.48	Describe your ability to forecast job costs based on budgets, open commitments, actual cost to date and potential change orders.	
P.49	Do you have the ability to forecast capital commitment spend amounts? Can you integrate project funding requests to annual capital plan?	
P.50	Do you have the ability to generate budget versus actual comparisons at the job level?	
P.51	Can you roll-up individual job requests by capital budget pool numbers and track then against an annual master capital plan?	
P.52	Can you track job costs from committed invoices (POs and Contracts)?	
P.53	Explain how you close/cancel remaining commitment balances (POs and Contracts).	
P.54	How do you track and view punch list items?	

#	Requirement	Vendor's Response
SOX & Internal Control Testing		
P.55	Describe your Post Mortem and Metrics Reporting capabilities. How do you measure performance vs. objectives – such as: $ per square footage, $ per seat, by cost category?	
P.56	Can management compare and contrast a project against other similar finished projects?	
Capital Improvement Planning		
P.57	Do you have the ability to track Capital Improvement Plan (CIP) data based on a user-selected Fiscal Year?	
P.58	Do you have the ability to track multiple funding sources? Explain.	
P.59	Can your system track a rolling 5 year Capital Improvement Plan with estimated costs tracked against actual appropriations?	
P.60	Do you have the ability to track projected spend by year or part of a year?	
P.61	Does the system allow for grouping of projects by: - Funding source - Department - Program type - Etc	
P.62	Can program types be loaded into the system's pick lists (Environmental, Fire, Health, etc.)	
P.63	Explain how flexible navigation allows users to locate a specific project.	
P.64	Can multiple budget categories be defined and tracked for a CIP project?	
P.65	For each budget category, can the system track the cost status for: - Adopted CIP Budget - Revised CIP Budget - Initial Contract Value - Amendments/Change Orders - Current Contract Value - Paid to date - Etc.	

#	Requirement	Vendor's Response
P.66	For each project, can the system track: - Project Manager - Team Lead - Architect-Engineer - Contractor - WBS# - City Council District - Address - Key Map identifier - Client Department - Scope of Work - Justification - Project Photo(s)	
P.67	Can remarks be added identifying when and by whom the remarks were added?	
P.68	Can documents be attached to the CIP project record?	
P.69	When a CIP project becomes active, does your system automatically update the CIP through your Project Management module?	
P.70	Does your system have the ability to use a template "Pick List" to select project activities (such as Acquisition, Schematic Design, Design Development, etc.)	
P.71	Does the system automatically allow for the entry of the following dates for each selected project activities: - Forecasted Start & Finish Dates - Current Planned Start & Finish Dates - Actual Start & Finish Dates	
P.72	Can the project activities and dates automatically generate a Project Gantt chart?	
P.73	Describe the filtering and/or query capability your system provides for CIP projects.	
P.74	Do you have the ability to track "missed" Appropriations? (Money that was appropriated but not spent in the year it was designated?)	
P.75	Do you have the ability to flag projected project costs coming in over the amount appropriated?	

#	Requirement	Vendor's Response
P.76	Can email notifications be sent automatically to various personnel (Project Manager, Team Lead, and Department Approver) for approval of projects or project changes?	

Maintenance Management

#	Requirement	Vendor's Response
Service Request (Self Service access)		
M.1	Do you provide the ability for an end user of a facility to send a request to the facilities personnel for service requests? Do you provide the ability to include certain pre-defined issues?	
M.2	Do you provide the ability to generate reports for all the categories of issues and the appropriate status?	
M.3	Do you provide the ability for facilities personnel to create, manage, generate and send work orders from the requests submitted by end users? Explain how your system logs and tracks client request through completion of work order.	
M.4	Do you provide the ability to assign a work order to a trade group and/or an individual? Do you allow the assignment to trade groups in physical locations (such as within specific buildings?)	
M.5	Do you provide for multiple dispatch options - email, pager, mobile device, directed to printer based at work unit?	
M.6	Do you allow the review and reporting against old (closed) work orders?	
M.7	Do you auto-generate an online survey sent to the requestor upon completion of a work order or service request? Does this survey allow for feedback on a service provider's performance?	
M.8	Explain how your system interfaces to the user. Email notification?	
M.9	What standard metrics are tracked in your system for service requests?	
M.10	Explain your Cal Center functionality.	
M.11	Explain how you track Customer Satisfaction scores by category, building, personnel, etc.	

#	Requirement	Vendor's Response
Service Management		
M.12	Explain how all facility management functionality is supported through a normalized database eliminating redundant data entry, management and manual processing.	
M.13	Do you provide a mechanism for tracking service expectations and monitoring compliance of both internal and outside service providers?	
M.14	Explain how you permit classification and prioritization of service requests.	
M.15	How do you create and update annual property operating budgets? How about five year program plans?	
M.16	Explain how your tool enables the planning and prioritization of annual operating and capital budgets.	
M.17	What standard metrics are tracked in your system for service management?	
M.18	Do you provide the ability to "drill down" on an asset to view history of requests? Do you allow the same type of drill down from a Work Request to see the history of the asset or request?	
M.19	Explain how you support the tracking of regulatory compliance and compliance records such as permits and placards, and UST/AST and self-insurance required for building operation.	
Inventory Management		
M.20	Do you provide the ability to track building systems/devices used in a building (for example sprinklers, HVAC units)? Describe key data elements you maintain. Can systems made up of many parts be related (for example: HVAC Unit, Blower, Chiller, Power Supply, etc)?	
M.21	Do you provide the ability to track service and parts providers associated with building equipment of systems?	
M.22	Do you provide the ability to track all assets requiring maintenance and the history of maintenance performed (both preventive and demand)?	
M.23	Do you track recalls and manufacturer notices?	

#	Requirement	Vendor's Response
M.24	Describe the means you have for costing consumables inventory. Describe how consumable costs are entered onto work orders	
M.25	Describe the means you have for issue replenishment requisitions to an external procurement system (must track Fiscal Year, Business Unit, Fund/Fund Detail, Cost Center, Project, and Account [Sub Object or Revenue Source]).	
M.26	Do you provide an interface point for receipts entered from an external system? Describe non-data entry means to update inventory while stocking shelves?	
M.27	Do you provide the ability to track inventory, both equipment and consumables, required to maintain assets? Explain the method(s) your system employs to assure adequate levels of parts are always available.	
M.28	Do you provide the ability to track service providers and vendors associated with the provision of maintenance?	
M.29	What standard metrics are tracked in your system for inventory control?	
M.30	Do you provide integration for inventory tracking with SAP Materials Management module?	
Preventive Management		
M.31	Do you provide the ability to track preventive maintenance schedules with automated "tickler" alerts? Please explain how you setup maintenance schedules and programs.	
M.32	Do you provide the ability to track all preventive maintenance requirements?	
M.33	Do you provide the ability to track preventive maintenance work orders, the service(s) provided, the inventory used and the provider conducting the service?	
M.34	Explain how you produce and dispatch preventative maintenance work orders.	
M.35	Do you provide the ability to support grouping of PM activities, (such as all HVAC filter changes) into one maintenance event?	

#	Requirement	Vendor's Response
M.36	Does your PM program have links to the Deferred Maintenance functions to automatically flag delayed PM events for visibility in the Deferred Maintenance program? If so, how does this work.	
M.37	How do you track and provide access to maintenance history information?	
M.38	How do you track MSDS information and equipment maintenance manuals?	
M.39	What standard metrics are tracked in your system for preventive management, including those associated with MTD, QTD, and YTD PM completions?	
M.40	How do you track and provide access to warranty information?	
M.41	Do you provide a standards-based estimation tool for "common" maintenance tasks?	
M.42	Does your system support hand held devices for field personnel? Explain the features your system provides in this area.	
M.43	Does your system support multi-cycle P.M.s? (certain activities handled quarterly, others handled monthly, with others handled annually?)	
M.44	Do you support "Intelligent Adviser" type functionality to prompt the technician to follow a pre-defined sequence of preventive maintenance steps?	

Demand Work Orders

#	Requirement	Vendor's Response
M.45	Do you provide the ability to create, prioritize, assign and follow up on the status of all demand work orders?	
M.46	Explain how work order assignments are communicated. (What mechanisms are supported to dispatch individuals, trades, or by locations?)	
M.47	What standard metrics are tracked in your system for demand work order management?	
M.48	What mechanisms and/or tools (such as PDAs, wireless devices, barcode readers, etc) are used to track a work order status on a real time basis?	

#	Requirement	Vendor's Response
M.49	Do you provide the ability to track demand maintenance work orders, the service(s) provided, the inventory used and the provider conducting the service?	
M.50	Does your system support the classification of work order/service requests (Such as "No Charge – SLA", "Standard Charge" or "Above Standard Charge") and the billing/chargeback of chargeable activities?	
M.51	Do you support "Intelligent Adviser" type functionality to prompt the CSR to ask specific questions based on the nature of a request?	
Deferred Maintenance/Building Condition Assessment		
M.52	Do you provide functionality that allows the collection, analysis and reporting of maintainable asset data, specifically the current condition of those assets, including, but not limited to: -　Roofs by type, age, and condition, with running costs for repairs? -　Parking lot condition, seal coating, potholes, etc? -　MEP systems by type, age, condition and running cost for repairs?	
M.53	Do you provide the ability to track detailed annual property inspection and building condition assessment data?	
M.54	Explain how your system tracks code guidelines. How does your system maintain compliance status?	
M.55	Do you provide a mechanism for creating and assigning critical metrics to facility assets in support of condition assessment modeling?	
M.56	Do you provide the ability develop project scenarios and combine the projects into capital plans?	
M.57	Do you provide the ability to assess renewal funding requirements?	
M.58	Do you provide the ability develop project scenarios and combine the projects into capital plans?	
M.59	Do you provide any industry benchmarks for facility condition assessment?	

#	Requirement	Vendor's Response
M.60	Do you provide the ability to track depreciable assets, identify age and condition (i.e. carpet, furniture, etc.)?	
Resource Management		
M.61	Does your system track labor hours used to complete a work order? Describe the information you collect.	
M.62	Describe all options for capturing labor time spent on a work order. What data entry reduction options are available?	
M.63	Describe how the application manages labor rates. What options are available - average rate by skill; individual rate; etc.?	
M.64	Does your system measure performance (on time, length of task, etc.) in real time?	
M.65	What standard metrics are tracked in your system for labor tracking?	
M.66	Do you provide industry standard data for time required to perform standard tasks? Can this be used for work order estimation?	
M.67	Does your system allow for the approval of time by a supervisor?	

Energy Management

#	Requirement	Vendor's Response
Electric		
E.1	Do you have the ability to receive weekly feeds of raw data from an electric provider with usage and rate timed to ESIDs (meters)?	
E.2	Does your system have the ability track large numbers (5,000 or more) meters and associate them to buildings or portions of buildings?	
E.3	Can you track up to 24 months of historical usage and provide trend analysis by building/meter?	
E.4	Do you provide conversion of KWH to BTU equivalent?	
E.5	Do you provide capability to reconcile electric bills with rate times KWH used?	

#	Requirement	Vendor's Response
E.6	Do you have the ability to track contractual rates and automatically compare these rates to the rates charged on a bill, by electric provider?	
E.7	Do you provide the ability to adjust past bills if the rate is restated by the electrical provider?	
E.8	Can you export data to Excel?	
E.9	Do you have the ability to send payment information to SAP for payment of electrical bills? Can this be done on a user defined payment schedule?	
E.10	Do you have the ability to allocate electrical charges to buildings or building tenants? Can this allocation be prorated based on system calculation?	
E.11	Do you have the ability to transmit the allocation to cost centers within SAP?	
E.12	Can your system track scanned copies of the electric bills and associate them to the specific building or cost center record?	
E.13	Does your system have the ability to download projected $/KWH and fuel adjustment data for use in budgeting for future energy charges?	
E.14	Do you have the ability to project usage by building based on historical usage and usage criteria (such as projected ambient temperature, occupancy, etc.)?	
Natural Gas		
E.15	Do you have the ability to receive monthly manual entry of raw data from an natural gas provider with usage and rate timed to gas meters or a location code.address?	
E.16	Does your system have the ability track large numbers of meters and associate them to buildings or portions of buildings?	
E.17	Can you track up to 24 months of historical usage and provide trend analysis by building/meter?	
E.18	Do you provide capability to reconcile gas bills with a rate times the amount used?	
E.19	Do you have the ability to track contractual rates and automatically compare these rates to the rates charged on a bill, by the service provider?	

#	Requirement	Vendor's Response
E.20	Do you have the ability to project usage and rate based on historical usage and Natural Gas prices downloaded by NYMEX?	
E.21	Do you have the ability to monitor annual budgets versus project costs for remaining months?	